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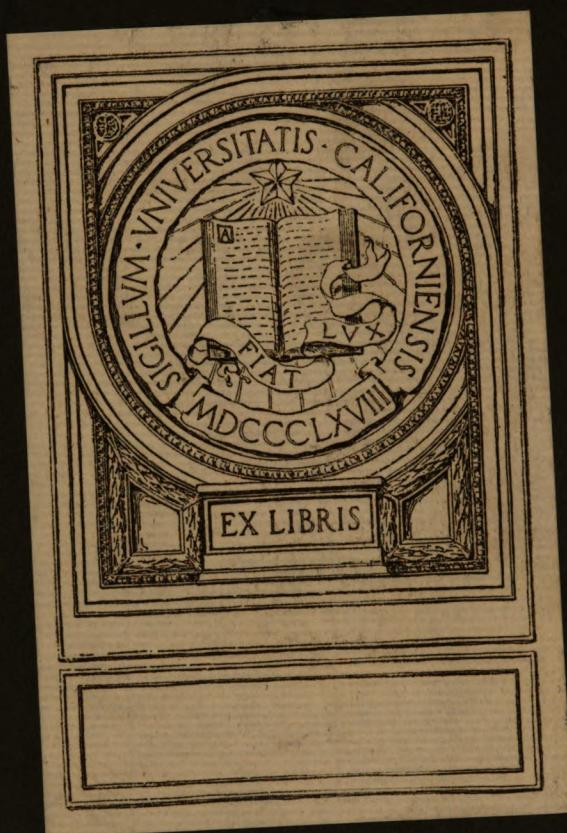
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A SYLLABUS  
OF  
LATIN-AMERICAN  
HISTORY

BY

WILLIAM WHATLEY PIERSON, Jr., Ph. D.  
UNIVERSITY OF NORTH CAROLINA



PRICE 25 CENTS

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## INTRODUCTORY NOTE

"In the establishment of the independence of Spanish America the United States have the deepest interest. I have no hesitation in asserting my firm belief that there is no question in the foreign policy of this country, which has ever arisen, or which I can conceive as ever occurring, in the decision of which we have had or can have so much at stake."—Henry Clay, *The Emancipation of South America*.

This syllabus is designed primarily for the use of students of the University of North Carolina as a guide to the introductory study of Latin-American history. In it an effort has been made to provide for as general and comprehensive a study of Latin-American civilization as the time limits of a single one year's course would permit. In such a process, of course, selection and rejection of data were necessary. The student seeking to specialize will, therefore, find it possible and easy to elaborate and amplify each of the chapters and sections into which the outline has been divided. Despite such comprehensiveness as was mentioned, the writer has endeavored to emphasize the institutional and economic aspects. The necessity of elimination and the effort at emphasis have resulted in the relegation of political history to a position of comparatively less prominence and significance than some might expect. For this the writer must plead necessity.

In view of the great contemporary interest in Latin America no case for the study of its history need be made. That interest in the United States has been chiefly caused by the exigencies and effects of a war which have made people conscious of trade opportunities formerly non-existent or, while existent, unrecognized, and many have concluded that the diplomatic, political and economic importance of Latin America has made of prime necessity a thorough study and a sympathetic understanding of its past history and institutions. The field of Latin-American history has hitherto been little known to and too often neglected by the undergraduate student in the universities,—if indeed, courses in such history have been offered. It is in the opinion of the writer, however, not lacking in comparative importance, interest, and cultural value with fields better known. It is hoped and confidently expected that the interest in the history and institutions of the Latin-American countries recently engendered by the consciousness that these countries have become potent economic factors in the modern world will be abiding. Latin-American history as a standard course will have much justification, for the part which the Latin-American peoples will play in the future, as Viscount Bryce recently said, "must henceforth be one of growing significance for the Old World as well as for the New."

The course as outlined in this syllabus provides for the study of the history, geography, political and social institutions, and the economic development and possibilities of Latin-American countries. A careful analysis and investigation will thus be made of the Spanish and Portuguese colonial systems and colonial experience in order to explain the wars of independence and the existing political and social conditions. Attention will then be directed to the development of republics, the struggle for political stability, and the exploitation of resources. The course will also include some study of the international relations—political and economic—and diplomatic problems which have arisen in recent Latin-American history.

At the outset the prospective student is warned that as yet there exists no single text-book devoted to the Latin-American republics which satisfactorily and adequately presents their history, describes their present conditions and discusses their institutions. This absence, of necessity, determines that the course will be based largely upon material to be found only in a number of books, public documents, and scientific reports. An effort has been made in this syllabus to meet this difficult situation. Lectures following the outline of the syllabus and explanatory of it, and recitations based on assigned readings, will constitute the class work. On these lectures and readings the students will be expected to take notes. In addition, they will be required to make certain class reports and at least once during the year to prepare, after consultation with the instructor, an essay on some topic of the syllabus or allied phase of the work.

Students will be required to provide themselves individually with a copy of this syllabus and with W. R. Shepherd's *Latin America* (Holt & Company). It is strongly recommended that they purchase also F. Garcia Calderon's *Latin America: Its Rise and Progress* (Scribners) and W. H. Koebel's *South America* (A. and C. Black). For the general student and reader the following list of books is recommended:

For description, geography, travel, peoples and social conditions:

James Bryce, *South America: Observations and Impressions*. (Macmillan).

C. R. Enock, *The Republics of Central and South America*. (Dent & Sons).

A. H. Keane, *Stanford's Compendium of Geography and Travel: Central and South America*. (2 Vols., Lippincott).

R. Reyes, *The Two Americas*. (Stokes).

A. Ruhl, *The Other Americans*. (Scribners).

A. H. Savage-Landor, *Across Unknown South America*. (2 Vols., Hudder & Stoughton).

For history:

T. C. Dawson, *The South American Republics*. (3 Vols. Putnam).

A. H. Noll, *A Short History of Mexico*. (McClurg).

F. Palmer, *Central America and its Problems*. (Moffat, Yard & Co.)

For institutions and history:

B. Moses, *The Establishment of Spanish Rule in America*. (Putnam).

B. Moses, *South America on the Eve of Emancipation*. (Putnam).

B. Moses, *Spanish Dependencies in South America*. (Harpers).

F. L. Paxson, *The Independence of the South American Republics*. (Ferris and Leach).

For trade relations:

W. E. Aughinbaugh, *Selling Latin America*. (Small, Maynard & Company).

E. B. Filsinger, *Exporting to Latin America*. (Appleton).

A. H. Verrill, *South and Central American Trade Conditions of Today*. (Dodd, Mead & Company).

The Monthly *Bulletin* and other publications of the Pan-American Union (Washington, D. C.), offer excellent and reliable information respecting all of these divisions, and are recommended.

For individual countries:

P. Denis, *Brazil*. (Scribners).

P. J. Eder, *Colombia*. (Unwin or Scribners).

G. F. S. Elliott, *Chile*. (Scribners).

C. R. Enock, *Mexico*. (Scribners).

W. A. Hirst, *Argentina*. (Scribners).

W. H. Koebel, *Argentina, Past and Present*. (Dodd, Mead & Co.).

W. H. Koebel, *Uruguay*. (Scribners).

W. L. Scruggs, *The Colombian and Venezuelan Republics*. (Little, Brown & Co.).

M. R. Wright's books on *Bolivia*; *Brazil*; *Chile*; and *Peru*. (Cazenove & Son).

Students wishing to make a more detailed study than this brief list would provide for can easily find an extensive bibliography on the subject in English, Portuguese and Spanish works which are of great value. They will do well to consult P. H. Goldsmith, *A Brief Bibliography* (Macmillan), although it is admittedly incomplete in its list of books and contemptuously harsh in its judgment of many of those included. The books that have been mentioned above, as well as those that have been listed in the syllabus, can be obtained from the publishers directly, through the University by special request of the student, or by ordering through some such wholesale and retail house as Baker & Taylor, New York City. The University of North Carolina, through the Bureau of Extension, Division of Correspondence Study, will be glad to give information and assistance to any who wish to purchase books for this study.

The writer would anticipate the criticism that the list of books specified in the syllabus for reading is incomplete. Since these readings are designed for class purposes and are selected as being practicable, the incompleteness was scarcely avoidable. The specialist will again find it easy to enlarge. In the list of readings, in order to conserve space, the author's name and full title of the book are stated when the first reference is made; thereafter only the author's name is employed, except in such cases in which the author has written more than one book or in which clearness seems to demand repetition.

The writer wishes to make acknowledgment of thanks for the advice and expert criticism of Professor William R. Shepherd of Columbia University, the greatest authority on the subject of Latin-American history and Hispanic institutions. He is also grateful for the valuable aid and suggestions of his friend, Mr. C. L. Chandler, formerly of the Consular Service and now associated with the Southern Railway and other railways. He was particularly benefited by Mr. Chandler's suggestions respecting the chapter on trade relations between Latin America and the United States. While profiting much from the ideas and advice of both, he is responsible for any errors and omissions as may appear.

Chapel Hill, N. C., October 2, 1916.

# A SYLLABUS OF LATIN-AMERICAN HISTORY

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## INTRODUCTION

### I. The Political Situation in Europe at Opening of the 16th Century.

1. The National States: England, France, Spain and Portugal.
2. The Holy Roman Empire.
3. The City States of Italy.
4. Other European States.

Readings: Hayes, *A Political and Social History of Modern Europe*, Vol. I, 3-25.

### II. Scientific and intellectual progress.

1. Medieval travels; the crusades.
2. The Renaissance.
3. Invention of the compass and improvement of the astrolabe.
4. Improvement and increase of maps.

Readings: Cheyney, *European Back-Ground of American History*, 41-59.

### III. European Commerce at the Opening of the 16th Century.

1. Trade and trade routes between Europe and the Far East.
2. The Mediterranean and the Italian cities.
3. Conquests of the Ottoman Turks; closing of old routes.
4. Decline of the Italian Cities.
5. Need of new routes; Battle of the Nile, 1516.

Readings: Cheyney, *European Background of American History*, 3-40; Shepherd, *Historical Atlas*, 98-99, 107-110; Hayes, 27-49.

### IV. The Commercial Revolution.

1. The geographic position of Spain and Portugal.

2. The Circumnavigation of Africa: Prince Henry the Navigator; Diaz; Vasco da Gama.
3. The Western passage; sought by Spain.
4. The Commercial revolution; effects.
5. Creation of trade companies; new methods of commerce.
6. Expansion and colonization; motives.

Readings: Bourne, *Spain in America*, 104-132; Cheyney, 123-146; Hayes, 27-69.

## V. Spain and Portugal at the Opening of the 16th Century.

### A. Background of Spanish history.

Spanish society:

1. Geographic influences in Spanish History.
2. Individualism of the people.
3. Influence of the various invasions of Spain.
4. Contact and conflict with the Moors.
5. Militarist spirit.
6. Evolution of types.
7. Governmental system.
8. The church and morals; the Inquisition; modifications in religion and morality.
9. Industries and economic situation of classes.
10. Expulsion of the Moors and Jews.
11. Motives of colonization.

Readings: Hume, *Spain*, 1-64; *The Spanish People*, 144-404; Cheyney, *European Background of American History*, 79-114; Ellis, *The Soul of Spain*, 29-105.

Additional Readings: Lea, *History of the Inquisition in Spain*; —, *The Moriscos of Spain*; —, *History of Sacerdotal Celibacy*, 80-85; 300-311; Milman, *History of the Jews*, Vol. III, 264-309; Altamira, *Historia de España y de la Civilización española*; Colmeiro, *Derecho administrativo español*.

### B. Background of Portuguese history.

Portuguese society:

1. General Characteristics.

2. Influence of climate in Portugal.
3. Position as European power in the 16th Century.

Readings: Cheyney, 60-74; Stephens, *The Story of Portugal*.

Additional Readings: Busk, *History of Spain and Portugal*; Martins, *The Golden Age of Prince Henry the Navigator*; Jayne, *Vasco da Gama and His Successors*; Major, *Life of Prince Henry the Navigator*; Hakluyt Society Publications.

## Chapter I. The Period of Discovery.

### A. Tracing the coast line by Spanish navigators.

1. The achievement of Columbus.
2. Achievements of: Hojeda, Cosa, Vespucci, Pinzon, Piñeda, Bastidas, Grijalva, Balboa, Magellan and Elcano, Guevara, and Saavedra.

Readings: Shepherd, *Historical Atlas*, 106-111; Morris, *History of Colonization*, 230-243; Bourne, *Spain in America*, 67-174; Payne, *European Colonies*, 33-53; —, *History of America*, Vol. I; Helps, *Spanish Conquest in America*; Koebel, *South America*; Thacher, *Columbus*; Guillemard, *Magellan*; Bancroft, *Central America*, Vol. I; Brittain, *Discovery and Exploration*, 56-296.

### B. Internal exploration and settlement.

1. Achievements of: Cortes; Pizarro; Cabeza de Vaca; and other Spanish Explorers.
2. Explorations of Portuguese in Brazil.
3. Settlement of the West Indies.
4. Settlement of Mexico and Central America.
5. Settlement of Spanish South America.

Readings: To those of Section A, add Prescott, *Conquest of Mexico*; Bancroft, *History of Mexico*; Bandelier, *Contributions to the History of the Southwestern Portions of the United States*; de Lannoy and Vander Linden, *Histoire de L'Expansion Coloniale des Peuples Europeens* (Portugal et Espagne); Bolton, *Spanish Exploration in the Southwest*.

### C. Relations of Spain and Portugal in 16th Century.

1. Rivalry for trade supremacy.
2. Appeal to the Pope.  
Line of Demarcation, 1493.
3. The Treaty of Tordesillas, 1494.
4. Boundary commissions and disputes.
5. Treaty of Saragossa, 1529.
6. Mid-century relations.
7. Union of Portugal and Spain, 1580.

Readings: Shepherd, *Latin America*, 9-19; Bourne, 31-33; 131-132; —, *Essays in Historical Criticism*, 193-217; Keller, *Colonization*.

Additional Readings: Altamira, *Historia de España*.

## Chapter II. The Spanish Colonial System.

### A. Imperial Control.

1. Early methods of colonization.  
Spanish inexperience; government aid and activities; private enterprise; quick evolution of a system.
2. The *capitulation*; that of Columbus compared with later ones.
3. The *Casa de Contratacion*.
4. The Council of the Indies.  
Organization; powers; duties; methods of administration; accomplishments.
5. Control of emigration.
6. Interference in colonial affairs.
7. Means of control; special commissions; the *visitador*; the *residencia*; recall.
8. Difficulties of administration:
  1. Distance between colonies and home government.
  2. Defective means of communication.
9. Exclusion of foreign influences from Colonies.
10. Decline of the system; changes effected in the 18th Century; red tape and routine.
11. Comparison of the Spanish System of Colonization with the systems of other colonizing countries.

Readings: Shepherd, 19-26; Bourne, 220-242; Morris, 244-259; Roscher, *The Spanish Colonial System*; Moses, *Establishment of Spanish Rule in America*; Cambridge Modern History, Vol. X, 244 et seq.

Additional Readings: Zimmermann, *Die Kolonialpolitik Portugal und Spaniens*; Leroy-Beaulieu, *De la Colonisation chez les Peuples Modernes*, 1-40; Puente y Olea, *Los Trabajos Geograficos de la Casa de Contratacion*; Colmeiro, *Historia de la Economia Politica en España*, Vol. II.

B. Spanish Administrative System in the Colonies.

1. No distinct separation of powers; the executive, legislative, judicial, and ecclesiastical powers of government.
2. Office of *Viceroy* in Spanish America.
  1. History of the office.
  2. Appointment; powers in the various departments of the government; dignity of office; perquisites and rewards.
3. Offices of *Adelantado*; *gobernador*; *captain-general*; Intendants; minor officials.
4. The *Audiencia*; *presidencia*.
5. Local government: the *alcalde*; the *cabildo*; *ayuntamiento*.
6. Courts of law; position of lawyers.
7. Conduct of government.
8. Operation of the system; discretionary powers as to enforcement or non-enforcement of laws; opportunities of local officials to evade imperial restrictions.
9. Relations of officials with the home government.

Readings: Shepherd, 25-29; Moses, *Establishment of Spanish Rule*; —, *Spanish Dependencies of South America*, 263-275; Morris, 244-259; Smith, *The Viceroy of New Spain*, 100-248; Bourne, 202-242; Southwestern Historical Quarterly, Vol. XIX; Hill, *Office of Adelantado*, (Political Science Quarterly, Vol. XXVIII); Roscher, *The Spanish Colonial System*; Humboldt, *Political Essay on New Spain*.

Additional Readings: Bancroft, *Central America*, Vol. I, Chapter V; Cambridge Modern History, Vol. X, 244 *et seq.*; Desdevises du Dezert, *L'Espagne de L'Ancien Régime* (Les Institutions) 122-163.

C. The Church. *Real Patronato*.

1. Royal control of the Church in oversea dominions.
2. The clergy in the colonies.
3. The priest as a colonizer.
4. The mission system; the Church and the Indian.
5. Jesuits and other clerical orders.
6. The Inquisition in Latin America.
7. Relations of Church and State.
8. The Church in Spanish and Portuguese colonies compared.

9. Some notable priests and monks.
10. Expulsion of Jesuits.

Readings: Shepherd, 49-59; Bourne, 302-319; Moses, *Establishment of Spanish Rule*, Chap. IV; —, *South America on the Eve of Emancipation*, 119-142; —, *Spanish Dependencies in South America*, Vol. I, 338-349; 364-380; Vol. II, 143-153; 206-232; Smith, 229-248.

Additional Readings: Lea, *The Inquisition in the Spanish Dependencies*; Graham, *A Vanished Arcadia*; Koebel, *In Jesuit Land*; Lowerey, *Spanish Settlements in the United States*, Vol. I, 339-366; Cambridge Modern History, Vol. X, 253, *et seq.*

D. The Indians and the Labor System.

1. The aborigines: tribes; number.
2. Indian civilization.
  - a. The Aztecs of Mexico.
  - b. The Incas of Peru.
3. Treatment of Indians by the Spanish; comparison of this treatment with that by other nations.
4. Laws of Spain relative to Indians.
  - a. Early regulations; instructions to Columbus.
  - b. The "New Laws," 1542.
  - c. Labor laws and customs:
    1. *Encomienda*.
    2. *Repartimiento*.
    3. *Mita*.
    4. Office of *Corregidor*.
  - d. Indian slavery; effect of labor system on Indians.
  - e. Law and practice.
5. Reputation of Spaniards for cruelty.
6. Taxation of Indians.
7. Work of Las Casas and Ancheta.
8. Indian resistance against Spanish system; Tupac Amaru.
9. Importation of negro slaves.
  - a. The Spanish theory.
  - b. The asiento.
  - c. Laws governing negro slave labor.

Readings: Shepherd, 29-32; Morris, 239-241; 245-251; Moses, *South America on the Eve of Emancipation*, 167-217; —, *Spanish Dependencies*, Vol. I, 204-229; Church, *The Aborigines of South America*.

Additional Readings: MacNutt, *Bartholomew de las Casas*; Prescott, *Conquest of Mexico*; —, *Conquest of Peru*; Robertson, *History of America*, Book VIII; Helps, *Spanish Conquest in America*; Saco, *Revista de Cuba*; Markham, *The Incas of Peru*.

E. Social Classes and Colonial Society.

1. Spanish types in the colonies:  
Basque; Gallego; Catalan; Andalusian.
2. Classes and race distinctions:  
Chapeton; Creole; Mestizo; Mulatto; Zambo.
3. Classes and the government; the *Divide et impera* policy.
4. Legacy of class distinction.
5. Spanish recognition of creoles and natives; numbers ennobled.
6. Colonial society; diversions; pursuits; occupations.

Readings: Shepherd, 29-38; Morris, 252-254; Garcia Calderon, *Latin America: Its Rise and Progress*, 44-58; Bourne, 253-268; Moses, *Establishment of Spanish Rule, Chapter II*; —, *South America on the Eve of Emancipation*, 100-118.

Additional Readings: Humboldt, *Personal Narrative of Travels*; Frezier, *Voyage a la Mer de Sud*.

F. Colonial Agriculture, Manufacturing, and Mining.

Readings: Bourne, 282-301; Payne, *History of America*, Vol. I, 254-362; Shepherd, 38-49; Moses, *South America on the Eve of Emancipation*, 328-340.

G. Trade System and Means of Transportation.

1. The Spanish Trade regulations; mercantilism; the staple cities.
2. Trade routes: oceanic; inland.
3. The *Consulado*.
4. Depots and staple cities; fairs.
5. Convoy and fleet system; taxes levied.
6. Trade companies:  
The Guipuzcoa company.
7. Obstacles to success of system:
  1. Smuggling.
  2. Buccaneers, pirates, and public enemies.
8. Final changes in system.
9. Portuguese trade regulations.

10. Means of transportation in colonial Latin America.
11. The War of Spanish Succession; Treaty of Utrecht.
12. The Anglo-Spanish relations at Porto Bello.

Readings: Shepherd, 43-47; Bourne, 282-301; Morris, 260-277; Moses, *Spanish Dependencies*, Vol. II, 244-365; Cambridge Modern History, Vol. X, 254-257; Haring, *The Buccaneers in the West Indies in the Seventeenth Century*.

Additional Readings: Blackmar, *Spanish Institutions in the Southwest*; Stevens, *Spanish Rule of Trade in the West Indies*; Esquemeling, *History of the Buccaneers*; Rubalcava, *Tratado Historico Politico y Legal del Comercio*; Walton, *Spanish Colonies*, Vol. II, 153-181.

#### H. The Colonial Taxation System.

1. The sources of revenue.
2. Taxes: *Alcabala*; *armada* and *armadilla*; *media anata*; royal ninths; Indian tribute; taxes on: salt; mineral products; tobacco.
3. Sale of offices.

Readings: Moses, *South America on the Eve of Emancipation*, 328-339.

#### I. Education and Thought.

1. The universities.
2. The clergy and education.
3. Literary productions; the press.

Readings: Shepherd, 59-68; Moses, *South America on the Eve of Emancipation*, 143-166.

Additional Readings: Humboldt, *Personal Narrative of Travels*.

#### J. Political History.

1. The Viceroyalties:
  1. New Spain, 1534.
  2. Peru, 1542.
  3. New Granada, 1739.
  4. La Plata, 1776.
2. Diplomatic relations of Spain and Portugal in 17th Century.

Readings: Watson, *Spanish and Portuguese South America*; Moses, *The Spanish Dependencies in South America*.

### **Chapter III. Settlement of Brazil and Portuguese Institutions.**

1. The voyage of Cabral; Portuguese claims; Correia, Coelho, de Souza.
2. Early settlements; attitude of Portuguese toward Brazil.
3. Portuguese system of colonization in Brazil.
  - a. The captaincies.
  - b. Theory and practice.
  - c. Comparison with Portuguese colonial system in the East Indies.
  - d. The Church in Colonial Brazil.
4. Treatment of the natives; intermarriage; regulations as to labor system.
5. Importation of negro slaves; slave codes.
6. Beginning of Westward Movement in Brazil.
  - a. Settlement of Sao Paulo.
  - b. Government of the frontier; the *Paulistas*; *Mamelucos*.
7. Society and thought in Brazil.
8. Conflict with the French and Dutch.
9. Relations with Portugal.

Readings: Denis, *Brazil*, 27-78; Morris, 214-220.

Additional Readings: de Lannoy and Vander Linden, 11-26, 172-181, 225-238; Merivale, *Lectures*, 47 *et seq.*, Pinheiro, *Historia do Brazil*; Southey, *History of Brazil*.

### **Chapter IV. Geography and Resources of Latin America.**

1. Geographic situation of South America.
2. Area of States in comparison with that of the United States and Europe.
3. Climate.
  - a. Seasons and temperature.
  - b. Rainfall.
4. Mountain ranges; rivers; water power.
5. Harbors.
6. Forests; commercial value of forest products.
7. Mineral deposits.
8. Animal life; introduction of animals and plants by Spanish.
9. Agricultural possibilities. Products in general: fruits; rubber; coffee; cacao; yerba; sugar; grasses; tobacco.

Readings: Shepherd, 107-121; Koebel, *The South Americans*, 184-304; Bryce, *South America*, 37-483; books on individual countries listed in Chapter VIII.

Additional Readings: Keane, *Stanford's Compendium of Geography and Travel—Central and South America*.

#### **Chapter V. The Struggle for Independence, 1806-1826.**

1. Sources and elements of discontent in Latin America; political and economic.
2. Influence of the American War of Independence; the French Revolution; and of English political philosophy.
3. Diffusion of new ideas; decline in effectiveness of the Spanish policy of exclusion; representative Latin-Americans in Europe and United States.
4. Invasion of Spain by Napoleon; overthrow of the legitimate government; establishment of the Napoleonic government and of a Spanish junta.
5. Disturbance in the colonies; attitude of the cities.
6. The interregnum; development of local juntas.
7. Gradual growth of desire and formation of plans for independence; character of the movement.
8. The revolt in the north: Miranda; Bolivar; Santander; Paez; Sucre; battles of Boyaca and Carabobo.
9. Attitude of foreign countries; aid of England.
  - a. Englishmen in the wars.
  - b. Citizens of the United States in the wars.
10. Revolt in the south: San Martin; Belgrano; O'Higgins; Lord Cochrane; battles of Maipo and Ayacucho.
11. Meeting of San Martin and Bolivar at Guayaquil.
12. Early evidences of national aspirations on the part of various communities.
13. Prosperity; free trade; interest of England and the United States.
14. Unity versus sectionalism.
15. The Confederation of New Granada; Bolivar as an executive and political theorist.
16. Political theories and conflicting ambitions of the generals.
17. Establishment of states.
18. Revolutionary society in South America.

19. Mexico and Central America: Hidalgo and Iturbide.
20. Saint Domingue: Toussaint L'Ouverture.

Readings: Shepherd, 69-81; Garcia Calderon, 58-86; Bryce, 423-448; Cambridge Modern History, Vol. X, 280-309; Robertson, *Francisco de Miranda and the Revolutionizing of Spanish America* (Amer. Hist. Assn. reports, 1907).

Additional Readings: Paxson, *The Independence of South American Republics*; Moses, *South America on the Eve of Emancipation*; Mitre, *The Emancipation of South America*; Petre, *Bolivar*; Mancini, *Bolivar*; Chandler, *Inter-American Acquaintances*.

#### **Chapter VI. Early Relations of Latin America with the United States; the Monroe Doctrine.**

1. Diffusion of revolutionary ideas and political opinions in Latin America.
2. Part of Latin Americans in the American war of independence.
3. Part of the United States in the Latin-American wars of independence.
4. Early ideas as to American concert.
5. Jefferson and John Adams on South America.
6. Early statements of the Monroe Doctrine.
7. Evolution of Monroe Doctrine during the Revolutionary War.
8. Attitude of European States toward Latin America after the Congress of Vienna.
  - a. Effects of revolutionary wars upon European politics and diplomacy.
  - b. The policy of intervention.
  - c. The Holy Alliance and the Concert of Europe.
  - d. Applications of policy of intervention.
  - e. The Congress of Verona.
  - f. The position of England.
9. The Canning-Rush-Adams correspondence.
10. The Monroe message.
11. Reception of Monroe Doctrine in South America and in Europe.
12. The Monroe Doctrine, 1823-1828.

Readings: Edgington, *History of the Monroe Doctrine*; Bingham, *The Monroe Doctrine, an Obsolete Shibboleth*; Garcia

Calderon, 58-85; Bryce, 422-451; Moore, *Digest of International Law* (Sections on Monroe Doctrine); The New International Encyclopaedia; *Annals of the American Academy of Political Science*, July, 1914; Robertson, *Reception of the Monroe Doctrine* (Political Science Quarterly, 1915).

Additional Readings: Gilman, *James Monroe*; Bigelow, *American Policy*; Coolidge, *United States as a World Power*; Hart, *The Monroe Doctrine*.

### **Chapter VII. Political Theories and Early Republican Institutions.**

1. Early political parties or groups and their theories: Unitary; federalist; conservative; and radical.
2. Political factions: Military; clerical; civilian; and lay.
3. Party methods and politics.
4. Ballot and elections; restrictions of the suffrage.
5. Popular apathy in political affairs; personal politics.
6. Character of governments: Federal and unitary.
7. Early constitutions; separation of powers.
8. The office of executive.
  - a. Constitutional powers in various countries.
  - b. Prestige and dignity of office.
  - c. Early types of executives: tyrants; dictators; liberators; restorers; caudillos.
9. Character and powers of Congress; congress *versus* president.
10. Influence of English and French cabinet systems of government.
11. The judiciary in Latin America:
  - a. Constitutional powers and position in administration.
  - b. Judicial review of legislation.
12. Early conventions and platforms.
13. Municipal government:
  - a. General characteristics.
  - b. Police systems.
  - c. Public service.
  - d. Prisons.

Readings: Shepherd, 81-96; Garcia Calderon, 100-350. Crichtfield, *American Supremacy*; books on individual countries.

## Chapter VIII. Political History, 1826-1915; Political Heritage of Colonial Times.

1. The three phases:
  1. 1826-1852, Age of Dictators.
  2. 1852-1876, Struggle for Stability.
  3. 1876—, Rise of Great States and Economic Progress.
2. Typical dictators:
  1. Garcia Moreno,—Ecuador.
  2. Ramon Castilla,—Peru.
  3. Rosas,—Argentina.
  4. Guzman Blanco,—Venezuela.
  5. Santa Anna and Diaz,—Mexico.
3. Progressive States of South America:
  1. Argentina:
    1. Rosas and Urquiza.
    2. Political progress and stability.
    3. Economic development and growth of population.
    4. The Southward movement in Argentina.
    5. Contemporary government and politics.

Readings: Koebel, *Argentina, Past and Present*; ——, *The South Americans*; Hirst, *Argentina*; Hammerton, *The Real Argentine*; Buenos Aires census reports.

2. Brazil:
  1. Brazil and Portugal, 1807-1822.
  2. The empire: Pedro I and Pedro II.
  3. Economic development.
  4. Emancipation of slaves.
  5. The Republic: Early disorders; progress toward stability.
  6. The Westward movement in Brazil.
  7. Contemporary government and politics.

Readings: Denis, *Brazil*; Cambridge Modern History, Vol. X, 310-339; Vol. XII, 674-676; Pinheiro, *História do Brasil*; Bennett, *Forty Years in Brazil*; Buley, *North Brazil*; ——, *South Brazil*.

3. Chile:
  1. Work of Portales and the *pelucones*.
  2. The conservative regime; ten year presidents.
  3. War with Spain.
  4. War with Peru and Bolivia.
  5. The problem of the Araucanians.

6. Balmaceda and the congress.
7. Relations with the United States; with Argentina; the "Christ of the Andes."
8. Contemporary government and politics.

Readings: Elliot, *Chile*; Garcia Calderon, 164-179; Markham, *The War between Peru and Chile*; Arana, *La Guerre du Pacifique*; Egaña, *The Taena and Arica Question*.

4. Uruguay:
  1. Relations with Argentina, Brazil, and Paraguay.
  2. Political organization and progress.
  3. Economic, educational, and religious developments.
  4. Contemporary government and politics.

Readings: Koebel, *Uruguay*; Roxlo, *Uruguay en 1904*.

4. Less Progressive and Backward States of South America.
  1. Venezuela:
    1. Revolutions and tyrants: Guzman Blanco; Castro.
    2. Foreign relations.
    3. Contemporary government and politics.

Readings: Dalton, *Venezuela*; Scruggs, *The Colombian and Venezuelan Republics*.

2. Colombia:
  1. Political record.
  2. Foreign relations.

Readings: Scruggs, *The Colombian and Venezuelan Republics*; Levine, *Colombia*; Eder, *Colombia*.

3. Ecuador.

Readings: Enock, *Ecuador*.

4. Peru.
  1. Political record.
  2. Foreign relations.
  3. Contemporary government and politics.

Readings: Enock, *Peru*; Wright, *Peru*.

5. Bolivia.

Readings: Wright, *Bolivia*; Walle, *Bolivia*.

6. Paraguay:
  1. Period of Francia.
  2. The Lopez group.

3. War with Brazil, Argentina, and Uruguay.
4. Contemporary government and politics.

Readings: Washburn, *History of Paraguay*; Hardy, *Paraguay*; Decoud, *Paraguay*.

5. Mexico:

1. Empire and early republic: Iturbide and Santa Anna.
2. Relations with Texas.
3. The war with the United States.
4. Struggle with the Church: Juarez.
5. Maximilian.
6. The Diaz regime; economic development.
7. Contemporary period: Madero; Huerta; Carranza; and Villa.
8. Relations with the United States.
9. Constitution and politics.

Readings: Enock, *Mexico*; Noll, *From Empire to Republic*;—  
*History of Mexico*; Fortier and Ficklen, *Central America and Mexico*; Bancroft, *History of Mexico*; Rives, *Relations of Mexico and the United States*; Bancroft, *Porfirio Diaz*; Pinchon and de Lara, *Mexico*; Martin, *Maximilian*;—  
*Mexico of the XXth Century*; Prida, *From Despotism to Anarchy*; Fornaro, *Carranza and Mexico*.

6. The Central American States:

First Class: Costa Rica and Guatemala.  
Second Class: Honduras, Salvador, and Nicaragua.

1. Race distribution.
2. Efforts at union.
3. Political and economic conditions.
4. Foreign relations.

Readings: Villafranca, *Costa Rica*; Winter, *Guatemala*; Guardia, *Costa Rica*; Squier, *States of Central America*; Palmer, *Central America*; Fortier and Ficklen, *Central America and Mexico*; Martin, *Salvador*.

7. The Insular Republics.

Readings: Fiske, *West Indies*; Eves, *West Indies*; Clark, *Commercial Cuba*; Callahan, *Cuba and International Relations*; St. John, *Haiti, the Black Republic*; Hazard, *Santo Domingo, past and present*; Lindsay, *Cuba and her People of Today*.

8. Panama:

1. Secessionist tendencies in Panama.

2. The revolution.
3. The republic.
4. Relations with Colombia and the United States.

Readings: Bishop, *Panama, Past and Present*; Gause and Carr, *The Story of Panama*; Bunau-Varilla, *Panama; the Creation, Destruction and Resurrection*.

Readings in general for political history: Dawson, *The South American Republics*; Akers, *History of South America*; Dodd, *Modern Constitutions*; Rodriguez, *American Constitutions*; Koebel, *South America*; Gracia Calderon, *Latin-America*; Cambridge Modern History, XII, 672-689; Enock, *The Republics of Central and South America*; Porter, *The Ten Republics*.

#### **Chapter IX. Relations with One Another and with Europe.**

1. Boundary disputes and Commissions.
2. Filibustering expeditions and reprisals.
3. The Status of Uruguay.
4. The war against Paraguay.
5. The Chile-Peru-Bolivia war.
6. International standing of Latin America.
7. The problem of unity:  
Panama Congress, 1826; Lima Congress, 1864; other congress and their purposes.
8. Central American affairs; arbitration agreement.
9. The A. B. C. Alliance.
10. Relations with Europe:  
Diplomatic; economic; cultural.
11. European interventions in Latin American affairs.

Readings: Shepherd, 96-106; Koebel, *The South Americans*, 41-63; Garcia Calderon, 335-350; Cambridge Modern History, Vol. XII, 689-702; Vicuña Mackenna; Moore, *Brazil and Peru Boundary Question*.

#### **Chapter X. Later Diplomatic and Political Relations with the United States.**

1. Development and extension of the Monroe Doctrine:
  1. The Jackson-Van Buren attitude.
  2. Polk's revival, interpretation, and restriction.
  3. Monroe Doctrine in the fifties:
    - a. Connection with slavery issue.
    - b. Paraguay, 1857-59.

4. The Maximilian episode.
5. The United States and the Chilean war with Spain.
6. Grant and the nationalization of the doctrine.
7. The Santos claim in Ecuador; Alsop claim in Chile.
8. Cleveland-Olney extension.
9. Monroe Doctrine and imperialism.
10. Roosevelt-Taft period.
11. Wilson Doctrine.
12. Monroe Doctrine and the claims of the United States against Latin American countries:
  - a. Contractual,—Alsop, Cerutti, Landseau.
  - b. Tortuous,—Perkins boat; "Macedonian."

Readings: Appropriate sections of Edgington, Bingham, Moore, Bigelow; American State Papers; Minister Dudley's report, U. S. For. Rel., 1899; Vicuña Mackenna, *Historia de la Administracion Montt*; ——, *Historia de Chile*; New International Encyclopaedia; Barrett, *Latin-America of Today and its Relation to the United States*.

2. Latin-American attitude toward the United States.
  1. In politics and diplomacy.
  2. In Commerce.
3. Efforts at coöperation and friendship:
  - A. The Pan-American Union.
    1. Organization and purposes.
    2. Control and accomplishments.
  - B. Work of Blaine, Root, McAdoo.
4. The Drago Doctrine and the Porter Doctrine.
5. Latin America at the second Hague Conference.
6. The Platt Amendment:
  1. Relations with Cuba.
  2. Relations with Santo Domingo; Haiti; Nicaragua.
7. The Panama Canal:
  1. Treaties and plans for construction.
  2. The French enterprise.
  3. Relations of Colombia and the United States.
  4. Secessions and independence of Panama.
  5. Hay-Bunau-Varilla treaty.
  6. Construction of Canal.
  7. Possible economic and political effects.
8. Wilson Administration.
  1. Latin American policy.
  2. Relations with Mexico.
  3. Achievements.

Readings: Senate Doc., No. 744, 61st Cong., 3rd Session; *Annals of American Academy of Pol. Science*, July, 1914; Bryce, 484-520; Garcia Calderon, 298-312; Latane, *America as a World Power*, 255-285; —, *Diplomatic Relations of the United States with Spanish America*.

Additional Readings: Flack, *Spanish American Diplomatic Relations Preceding the War of 1898*; Chandler, *Inter-American Acquaintances*; Moore, *American Diplomacy*; Maurtua, *La Idea Pan Americana y las cuestiones del arbitraje*; Usher, *Pan-Americanism*; Gause and Carr, *The Story of Panama*; Bishop, *Panama, Past and Present*.

## Chapter XI. Trade Relations of Latin America and the United States.

1. Origins of trade.
2. Development of trade during the 19th century:
  1. Comparative predominance of United States to about 1850.
  2. Disruption of trade during War of Secession.
  3. Increased European competition after Franco-Prussian war.
3. History of trade in the 20th century.
4. Volume of contemporary trade, export and import, with U. S.; with Europe.
5. Character of the trade:
  1. Standard articles imported and exported.
  2. Non-competitive goods and raw products.
  3. Competitive goods.
6. Purchasing power of Latin American countries.
7. Misconceptions, current in United States, as to Latin-American habits of business.
8. Obstacles in the way of trade:
  1. Lack of merchant marine.
  2. Established habits and traditions of trade.
  3. Ignorance of market and the accepted methods of trade:
    - a. Market demands.
    - b. Transportation problems.
    - c. Tariff administrations.
  4. Long term credits.
  5. Lack of organization to secure the trade.
9. Methods for improvement.
10. Effects of the European war of 1914; construction of the Panama Canal.

11. Increase of American business interests in Latin America.

Readings: Verrill, *South and Central American Trade Conditions of Today*, 168-179; Aughinbaugh, *Selling Latin America*; Babson, *The Future of South America*; Bonsal, *The American Mediterranean*; Chandler, *Inter-American Acquaintances*; Hough, *Practical Exporting*; Shepherd, 168-179; —, *Our South American Trade* (Pol. Science Quart., Dec., 1909); *National City Bank Magazine*; Filsinger, *Exporting to Latin America*; Savay, *The Science of Foreign Trade*; Supplement, *London Times*; U. S. consular reports; reports of the Department of Commerce and Labor (now Department of Commerce).

**Chapter XII. Contemporary History Problems and Achievements of Latin America.**

1. Political:

1. Political and governmental stability.
2. Politics in practice and principle.
3. Modern conventions, platforms, and elections.
4. Restrictions of the ballot.
5. Professional men in politics.
6. Absence of political experience by the masses.
7. Necessity of developing public interest in politics and political philosophy.
8. Appearance of new political issues.
9. Electoral reform: Argentina.
10. Civil Service in Latin America.
11. State or Church control over education.
12. Municipal Government:
  1. History of progress.
  2. Public utilities; fire departments; police system; water works; public sanitation; municipal ownership.
13. Social legislation.
14. Passing of the South American type of revolution.

Readings: Garcia Calderon, 222-248, 365-677; Shepherd, 141-150; Scruggs, *The Colombian and Venezuelan Republics*; books on individual countries.

2. Social and Religious:

A. Social:

1. Population:
  1. Census statistics available.
  2. Population and resources.

2. Social types: Spanish; immigrant; Indian, savage and civilized; mixed races; negro.
3. Laboring classes and types: "vaquero," "gaúcho," "llanero," "estanciero," industrial laborers.
4. Labor system and laws.
  1. Peonage:
    - a. Feudal status of labor in colonies.
    - b. Origin of peonage; inheritance of debt.
    - c. The "inquilino" and "colono;" "cholo."
    - d. Ignorance, wages, and living conditions.
    - e. Peon in government and politics.
    - f. Peonage in Mexico; in South America.
  2. Labor regulations in general.
  3. Labor organizations.
  4. Dearth of labor in certain countries.
5. Language.
6. The military missions.
7. Position of woman:
  1. In society.
  2. Family life.
  3. The matter of divorce.
8. Amusements and social customs:
  1. Sports and games.
  2. Carnivals and festivals.
  3. Dress and etiquette.
  4. Gambling and lotteries.
  5. Social customs in business.

Readings: Shepherd, 121-141; Garcia Calderon, 283-290; Bryce, 432, 528-530; Romero, *Mexico and the United States*; Birmingham, *Through South America*; books on individual countries and on travel.

B. Religious:

1. Prevalence of Roman Catholic Church.
2. Church and state; tendency toward separation.
3. Clericalism in politics.
4. The work of the Church.
5. Toleration in Latin America.
6. Protestant missionary activities.
7. Foreign opinion of Latin-American morality.

Readings: Shepherd, 139; Koebel, *The South Americans*, 41-44, 91-108, 152-169.

Additional Readings: Speer, *South American Problems*; Brown, *Latin America*.

3. Immigration:

1. History of immigration in the 19th century:
  - a. Causes of scarcity before 1857; colonial exclusion; revolutions; greater inducements of the United States; economic reasons.
  - b. Increase since 1857.
  - c. Drift toward the Southern republics.
  - d. Immigration in the North American republics.
2. Political and economic effects of immigration.
3. Effects on society.
4. Spanish, Italian, German, Russian and Polish, English, French, Portuguese, Oriental, Turkish and Assyrian immigration.
5. Favorite occupations of aliens.
6. The question of assimilation and citizenship.

Readings: Shepherd, 81-84, 126-129, 169; Koebel, *The South Americans*, 152-169; Garcia Calderon, 290-298, 323-335.

Additional Readings: Mulhall, *The English in South America*.

4. Financial:

1. Monetary systems in Latin America.
  1. Standards and values.
  2. Paper currency.
  3. Fluctuations.
2. Capital and Banking:
  1. Number of banks.
  2. Domestic and foreign control of banking.
  3. Branch banks:
    - a. European.
    - b. United States.
  4. Scarcity of capital.
3. Latin-American finance:
  1. Credits, exchange, solvency.
  2. Stock exchanges.
  3. Bond issues.
  4. Public debts.
  5. Sinking funds.
  6. Insurance.
  7. Trusts and corporations.
4. Foreign influences upon financial policies.

5. Business enterprises:
  1. Habits of business.
  2. Buying and selling; advertising.
6. Tariff systems:
  1. Tariff for revenue.
  2. Rates: specific rather than *ad valorem*.
  3. Variations and complexity.
7. Taxation:
  1. On personal property.
  2. On lands and real estate.
  3. On industries.
  4. Licenses and concessions.
8. Internal improvements and public works.
  1. History of internal improvements in Latin America.
  2. Public works: postal service; parcel post.
9. Movement for single, Pan-American monetary standard.
10. Movement for a Pan-American, standardized tariff system.

Readings: Shepherd, 43, 48, 150-153, 173; Verrill, Aughinbaugh, and Babson; The South American Year-Book; Consular reports; Reports of the Board of Trade (Eng.); books on individual countries.

5. Industrial:
  - A. The most important industries:
    1. Mining:
      1. Areas of ore fields.
      2. Facilities.
      3. Acquisition of mining properties.
      4. Labor supply.
      5. Gold, silver, diamonds, copper, tin, nitrate, coal, and other mines.
    2. Stock-raising:
      1. Areas adapted.
      2. Cattle, horse, sheep ranches.
      3. Stock-yards and slaughter-houses.
      4. Wool and hides.
    3. Rubber:
      1. Areas of growth.
      2. Processes employed.
      3. Labor supply; labor scandals; "black gold."

4. Agriculture:

1. Arable lands and climatic conditions.
2. Agriculture in connection with stock-raising.
3. Ownership of land.
4. The agrarian situation in Latin America.
5. The "haciendas," "fazendas," the "charcas" and "potreros."
6. Agricultural products: Coffee, cacao, yerba, foodstuffs,

5. Manufacturing:

1. General characteristics: domestic and factory methods.
2. Connection with other industries.
3. Obstacles in the way.
4. Products: foodstuffs, textiles, machinery.

B. European and American capital invested in industries.

C. Occupations of foreigners in Latin America.

Readings: Koebel, *The South Americans*, 132-151, 193-204; books on individual countries.

6. Commercial:

1. History of Latin-American Commerce.
2. Exports and imports:
  1. Character and value.
  2. Destination.
3. Commercial enterprises.
4. Customs regulations.
5. Modern transportation and communication:
  1. Development of transportation facilities.
  2. Survival of colonial methods in certain areas.
  3. Pack-trains, stage routes, llama trains.
  4. Roads and highways.
  5. Land transportation:
    1. Railroads: Trunk lines; short lines.
    2. International and transcontinental lines.
    3. Projected lines.
    4. Horse cars and trolleys; subways.
    5. Mileage and rates.
    6. Freight rates.
    7. Capital and ownership.
6. Water transportation:
  1. River steamers and barges.
  2. Oceanic lines.

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3. Harbor facilities.
4. Rates.
6. Communication :
  1. Telegraph lines.
  2. Cable lines.
  3. Postal service; international service.
7. The metric system of weights and measures.
8. Concessions and monopolies:
  1. Procedure in obtaining them.
  2. Policies of various countries in relation thereto.
  3. Attitude of the United States toward them.

Readings: Shepherd, 168-191; Koebel, *The South Americans*, 304-358; Verrill, Aughinbaugh, and Babson; Reports of Bureau of Trade Relations of the State Department; Report of the Bureau of Manufactures of the Commerce Department.

7. Educational and Cultural:

- I. Educational:
  1. General characteristics.
  2. Percentages of illiterates in various countries.
  3. Educational progress.
  4. Obstacles to popular education.
  5. Foreign influences in education.
    - a. European teachers in Latin-America.
    - b. American teachers in Argentina in 1868.
    - c. Influence of United States at present.
  6. Administration of schools.
  7. Elementary and secondary education.
  8. Higher education in Latin-America.
    - a. Universities:
      1. Faculties, courses, and equipment.
      2. Libraries and publications.
      3. Students.
    - b. Scientific pursuits.
      1. Observatories and other establishments for study of geography, ethnology, and zoology.
      - c. Industrial and technical education.
    9. Urban and rural education.
    10. Popular interest in education.
    11. Non-official efforts for promotion of education:
      1. Congresses and teachers' associations.
      2. Private schools and institutions.
      3. Publications and lectures.
    12. Educational reforms needed.

II. Cultural achievements in general:

1. Public Charity:

- a. Control and sources of revenue.
- b. Societies and institutions for social service.

2. Public Libraries.

3. Journalism:

- a. Status of the press in various countries.
- b. Notable newspapers.
- c. Recent development.
- d. Magazines and periodicals.

4. Literature:

1. General characteristics.
2. European and particularly French influence.
3. Representative literary men and their works.

5. Arts:

1. General characteristics.
2. Achievements in music; the drama; architecture; painting; and sculpture.

III. Achievements in music; the drama; architecture; painting; and sculpture.

Readings: For education: Shepherd, 192-204; —, *Education in South America*, (Review of Reviews, May, 1908); —, *Higher Education in South America*, (Columbia University Quart., Dec., 1907); Koebel, *The South Americans*, 109-132; Brandon, *Latin-American Universities and Special Schools*; Blakslee, *Latin-America*, 30-46; Monroe, *An Encyclopedia of Education* (See discussion under the names of each country; see also, Walle, *Bolivia*, Chap. 6; Eder, *Colombia*, Chap. 16; Hirst, *Argentina*, Chap. 14; and Wright's books on Bolivia, Chile, and Peru.

For cultural problems: Shepherd, 204-250; Garcia Calderon, *Latin-America*, 249-282; Warner, *Library of the World's Best Literature*, Vol. 15; Blakslee, *Latin-America*, 299-306; Koebel, *The South Americans*, 109-130; Coester, *The Literary History of Spanish America*; Starr, *Readings from Modern Mexican Authors*; Lamborn, *Mexican Paintings and Painters*.



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